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*8-17-99*

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#### Summary

Status	Under Evaluation
Processing Location	RSW
Functional Area	Specter/Transarc
Attorney/Patent Professional	Edward Duffield/Raleigh/IBM <i>YMD</i>
IDT Team	Edward Duffield/Raleigh/IBM <i>R. Redpath</i>
Submitted Date	08/12/99 05:03:02 PM
Owning Division	SWG Add/Change <i>SNSD</i>
PVT Score	11

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#### Inventors without Lotus Notes IDs

*M. Jones*

#### IDT Selection

#### Main Idea

**The LifeCycle Navigator**

The LifeCycle Navigator

**1. Describe your invention, stating the problem solved (if appropriate), and indicating the advantages of using the invention.**

There are many complicated and convoluted processes that users must follow in today's tools. One instance of a complicated process is the TeamConnection Development LifeCycle. Users often get confused as to how far along they are on this process, what steps are available, and what is the path most likely to be followed.

The LifeCycle Navigator is a combination of an active display of the past, current, and future steps, as well as a series of decision panels and forms to complete in order to traverse this path.

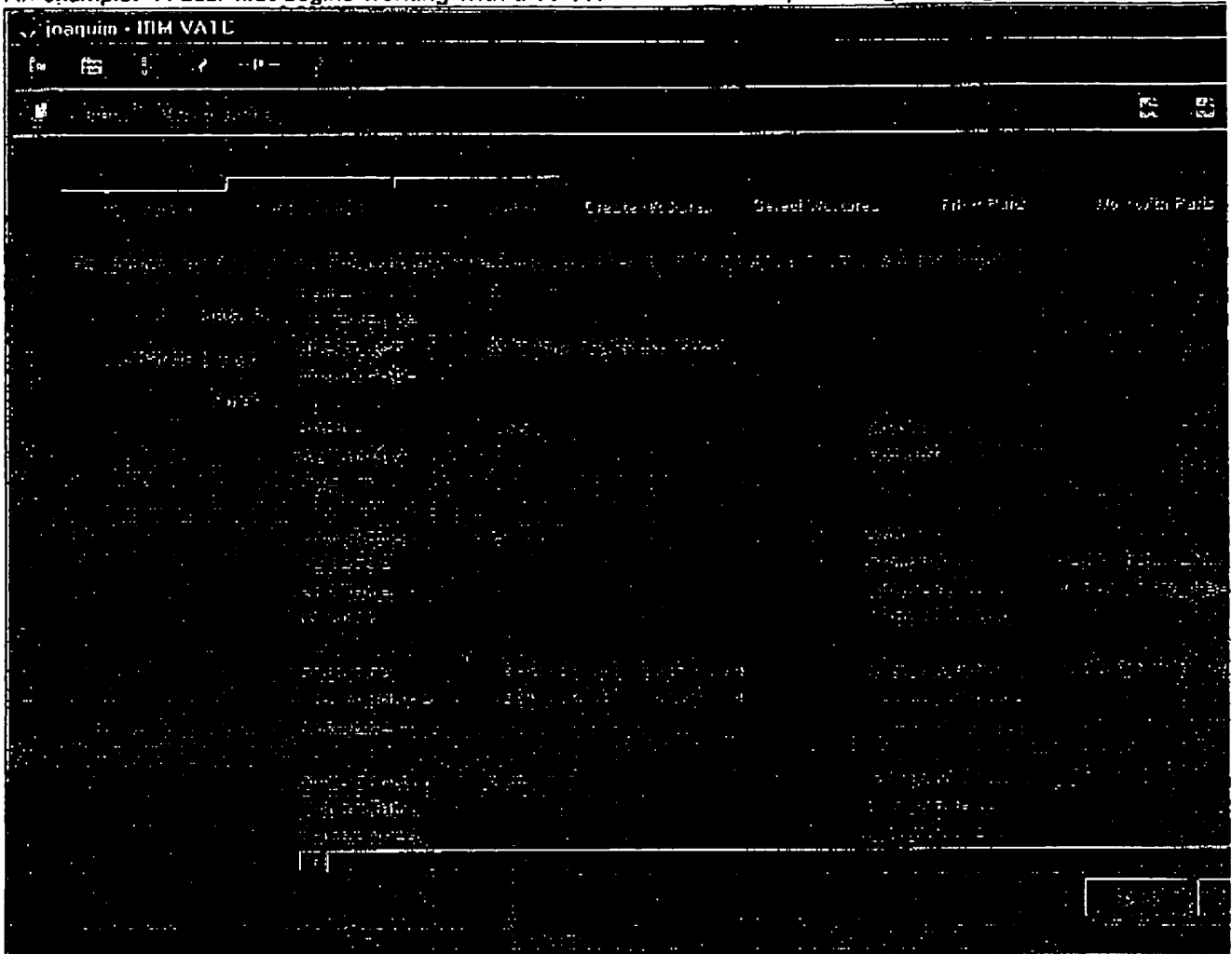
#### EXHIBIT A

## The LifeCycle Navigator - continued

2. How does the invention solve the problem or achieve an advantage, (a description of "the invention", including figures inline as appropriate)?

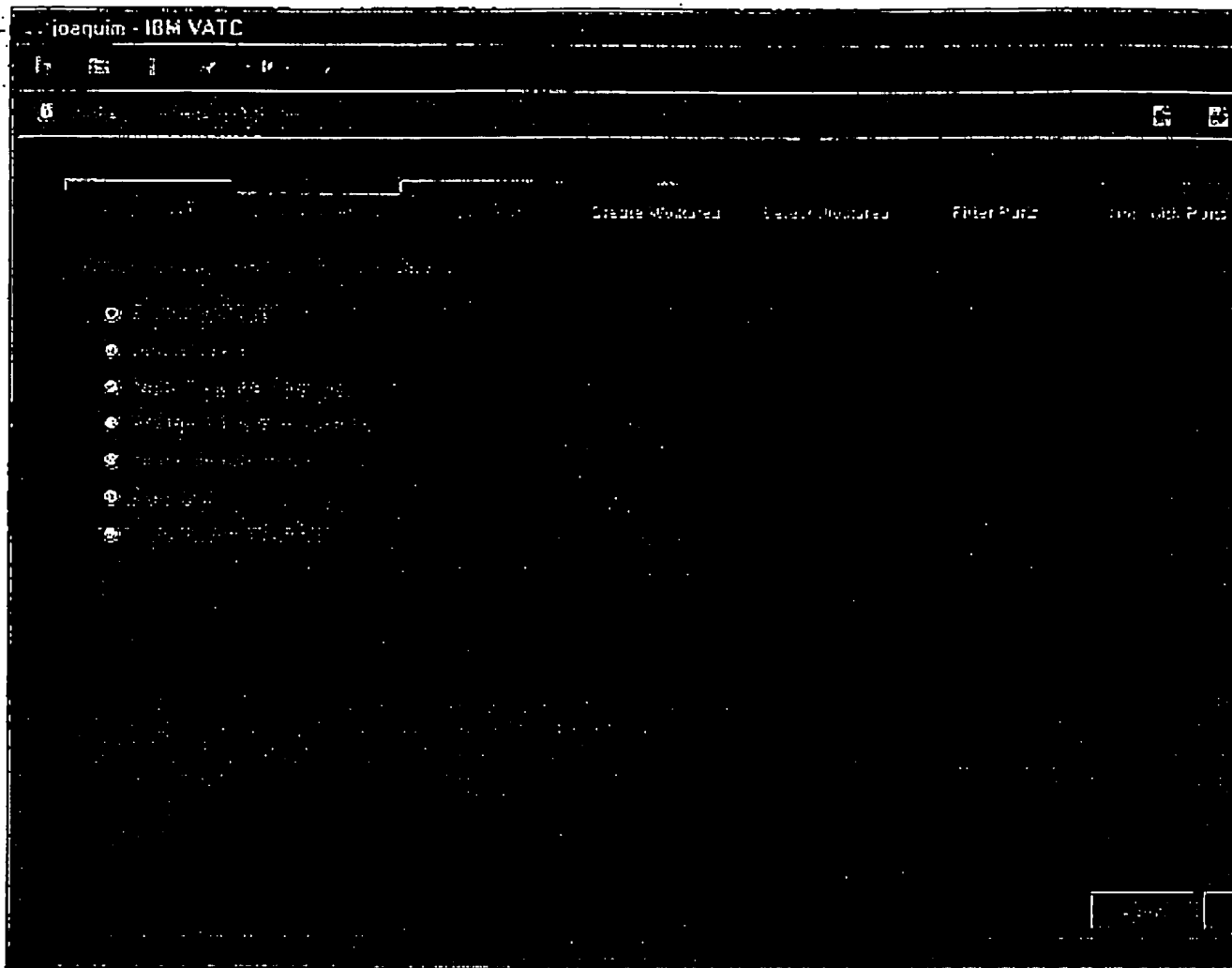
A user can quickly see how far along the most common route in the process that the user has traversed, as well as how much further the user must go to finish the most common route. The user can also see which steps are repeatable, skip forward (if possible) or back to another step, and when a different path is chosen from a decision panel, the user can quickly see what most common steps are ahead for the new path.

An example: A user first begins working with a defect within the LifeCycle Navigator. Figure 1



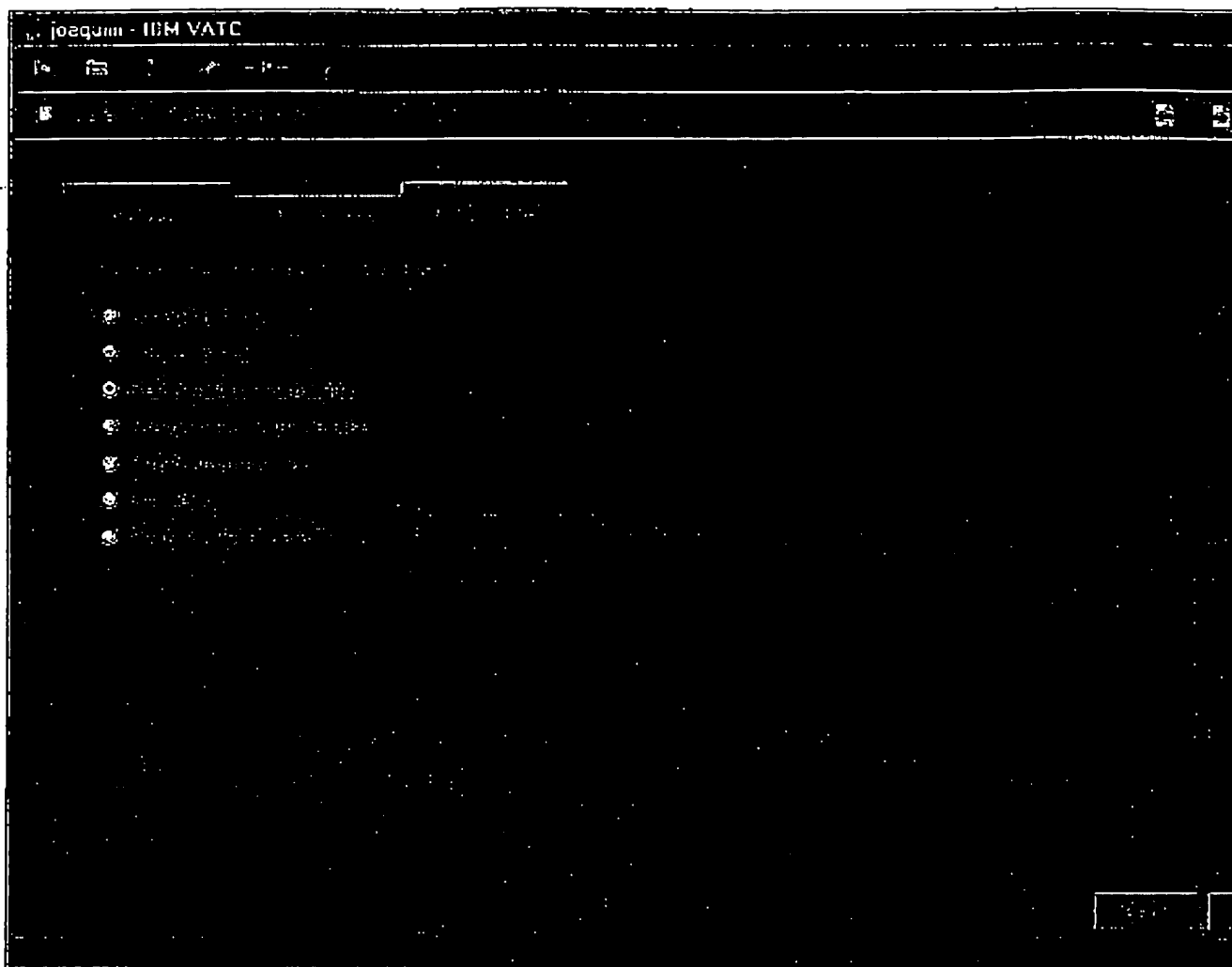
shows the initial view of the defect, the fact that the user is at the state "View Details", and that the most common route for a defect includes "Accept Defect" (which is already active), "Create Workarea", "Select Workarea", etc. The user can either select "Defect Options", select "Accept Defect" (which skips ahead in the LifeCycle), or just press Continue to go forward along the most common route. Figure 2

## The LifeCycle Navigator - continued



shows the next state of the LifeCycle Navigator. The user is at the "Defect Options" state (a decision panel), and can go back to "View Details", skip ahead to "Accept Defect" (the same as selecting Continue), or can choose another route. Figure 3

## The LifeCycle Navigator - continued



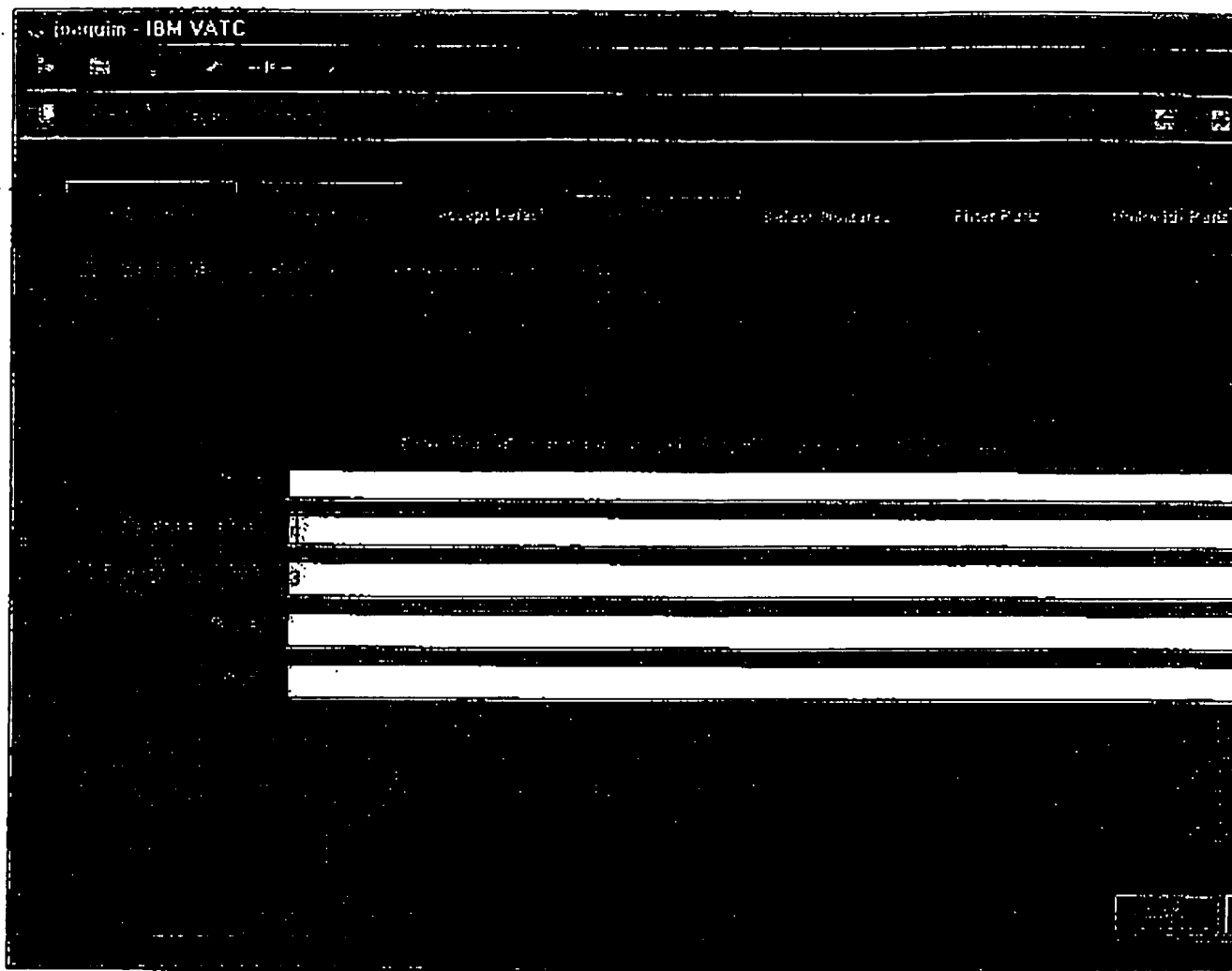
shows how the LifeCycle Navigator changes if another route is chosen. Once again, the most common route for this decision is shown. The user can see the different steps in this process and how much more needs to be done along this route. Each choice on a decision panel has an associated "most common route" with it, which will be displayed (and followed, should that route be chosen). If the user chooses to "Accept and fix it", the user goes to the "Accept Defect" state. Figure 4

## The LifeCycle Navigator - continued

The screenshot displays the LifeCycle Navigator interface. At the top, the title bar reads 'joaquim - IBM V41C'. Below it, a menu bar includes 'File', 'Edit', 'View', 'Tools', 'Help', and 'About'. A toolbar with various icons is positioned below the menu bar. The main workspace shows a process flow diagram. A central box contains the text 'This process is too complicated and must be redesigned.' To the left of this box is a vertical list of states: 'redesign', 'test failed', 'usability test', 'development', and 'candidate'. The 'redesign' state is currently selected and highlighted. The diagram also includes a box labeled '3.' and a box labeled 'Accept Defect' at the bottom right.

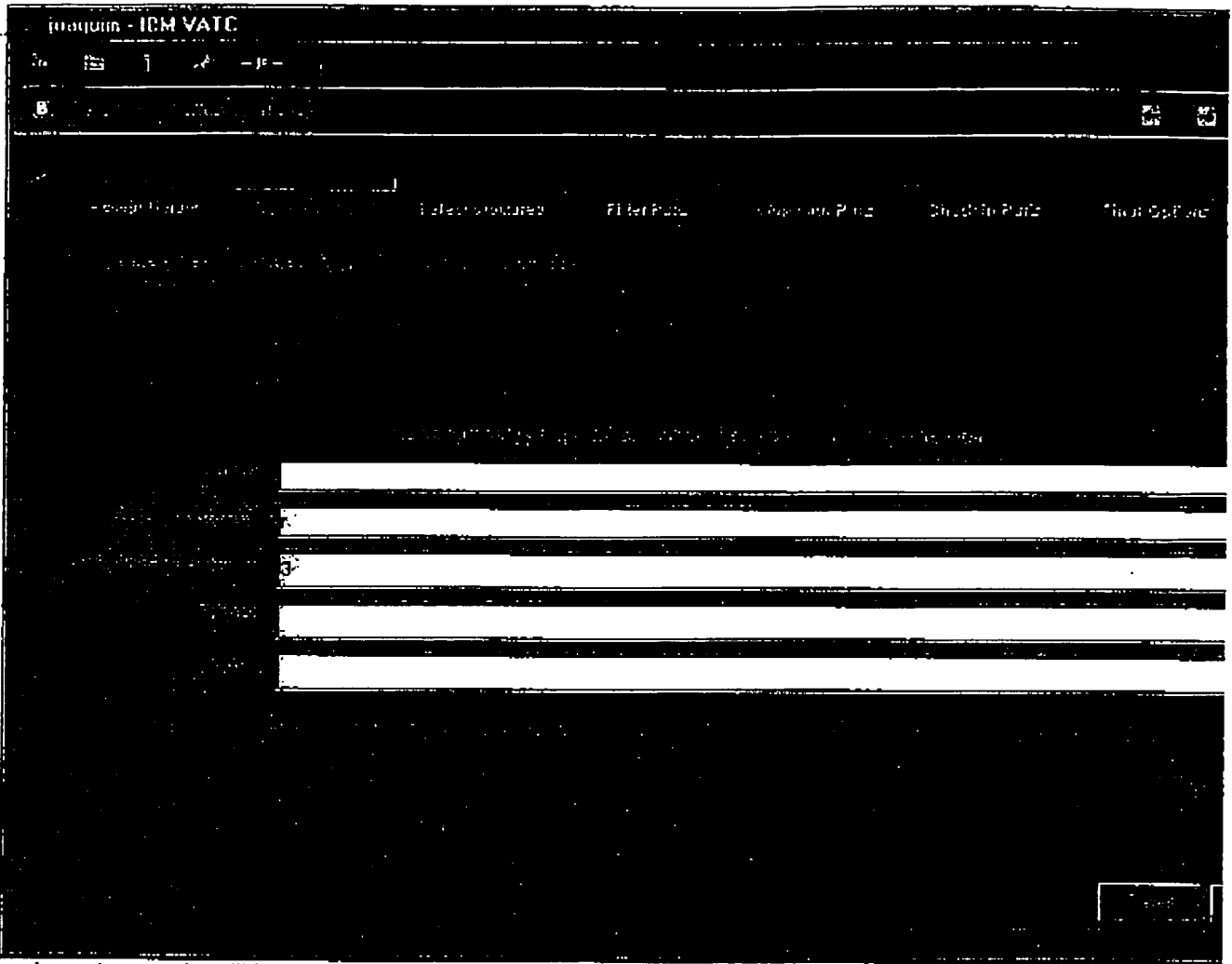
shows the "Accept Defect" state, which is a form. This step must be completed before the user can continue down this route. The user can still go back to either the "View Details" state or the "Defect Options" state. When the form is submitted, the user advances to the next state. Figure 5

The LifeCycle Navigator - continued



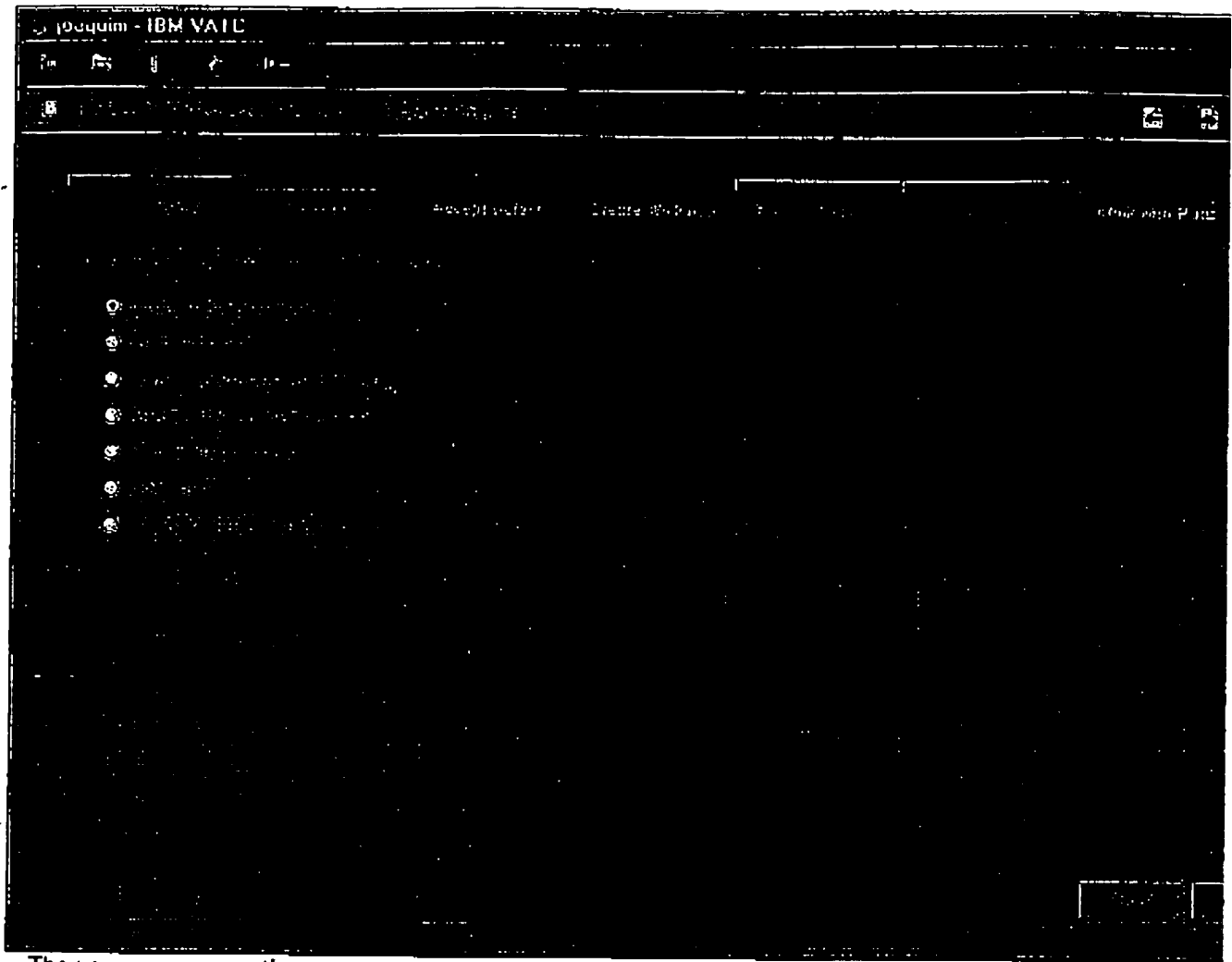
shows the "Create Workarea" state. Note that we cannot go back directly to the "Accept Defect" state. Also, returning to "Defect Options" will now present us with a different set of options. (See Figure 7 below.) Something else to point out is that the number of steps within the LifeCycle Navigator does not need to fit on one screen. Pressing the dark arrow at the end of the LifeCycle Navigator would show Figure 6

The LifeCycle Navigator - continued



, where the user is still in the "Create Workarea" state, and can see that there are only 5 more steps in order to complete this (complicated) process along the most common route. This step must also be completed before continuing along this route. Now, if the user completes this step, then decides that this was the wrong process to follow, the "Defect Options" step can be selected (or Back can be repeatedly pressed). This returns the user to the "Defect Options" step, which now appears as Figure 7

## The LifeCycle Navigator - continued



. The user can resume the most common route by selecting "Select Workarea" or "Filter Parts" or pressing Continue. Or the user can take another step. (Notice how "Return it to originator" is now "Undo workareas and return it", since the process necessary to move to that state has now changed.)

The LifeCycle Navigator could be implemented for most any complicated process, such as taxes. (Showing the most common route through the 1040 long form, the most common additional forms, and how short the process becomes if the 1040EZ route is selected.) One of the biggest fears of novice users is not knowing where the process is taking them. The LifeCycle Navigator assuages this (and other) fear(s).

3. If the same advantage or problem has been identified by others (inside/outside IBM), how have those others solved it and does your solution differ and why is it better?

The most common solution to this problem is a Wizard or SmartGuide. While these lead you through the process, you have no idea of what the most common route is, nor how much more you have to do. Also, should you desire to return to a decision point and take another direction, the Wizard or SmartGuide do not help you undo what you have done, nor do they show how that decision point has been changed due to the steps you have already taken. The LifeCycle Navigator shows you the most common route through the process for the path you have chosen. It shows



### The LifeCycle Navigator - continued

you where you are, how much more there is to do, where you can skip to (both forwards and back), and it modifies itself according to what decision you might like to make as well as what you have done within the process.

4. If the invention is implemented in a product or prototype, include technical details, purpose, disclosure details to others and the date of that implementation.

The invention is implemented in VisualAge TeamConnection v3.0.3.

**\*Critical Questions ( Questions 1 - 7 must be answered)**

On what date was the two-day "Coastal Patrol" held? Please provide the date and location of the patrol.

When you return from your patrol, will you be required?

Question 2	YES
Is there any planned or unplanned release or discharge of any hazardous substance (B)?	YES
Is this source the subject of action, investigation or remedial action that could potentially result in a release of hazardous substance?	YES
Is this source a "major source" as defined in 40 CFR 481.2(b)(1) and 481.2(b)(2)?	YES
Is this source the subject of action, investigation or remedial action that could potentially result in a release of hazardous substance?	YES

1. Name of the person or organization submitting the proposal: [REDACTED]  
2. Name of the person or organization to whom the proposal is submitted: [REDACTED]  
3. Title of the proposal: [REDACTED]  
4. Date of submission: [REDACTED]  
5. Address of the person or organization submitting the proposal: [REDACTED]  
6. Address of the person or organization to whom the proposal is submitted: [REDACTED]  
7. Description of the proposal: [REDACTED]  
8. Estimated cost of the proposal: [REDACTED]  
9. Estimated time for completion of the proposal: [REDACTED]  
10. Other information: [REDACTED]

Question 12	What are the sample means for the two groups? (Round to 2 decimal places.)	10.00	10.00
Question 13	What are the sample standard deviations for the two groups? (Round to 2 decimal places.)	1.00	1.00
Question 14	What are the sample standard deviations for the two groups? (Round to 2 decimal places.)	1.00	1.00

[illegible]

## The LifeCycle Navigator - continued

**Question 6**  
 Is the following in any way related to the subject matter of the patent?  
 Yes ☐ No ☐  
 If yes, enter the number of the related patent.

**Question 7**  
 Is the following in any way related to the subject matter of the patent?  
 Yes ☐ No ☐  
 If yes, enter the following: Name of Attorney, Counsel or Agent, State or  
 Country, Telephone, Fax, E-mail, and Website.  
 Name of Attorney, Counsel or Agent: \_\_\_\_\_  
 State or Country: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 Fax: \_\_\_\_\_  
 E-mail: \_\_\_\_\_  
 Website: \_\_\_\_\_

**Question 8**  
 Have you submitted or will you submit any related trademark applications?  
 Yes ☐ No ☐  
 If yes, please provide the trademark(s) and the date of filing.

**Question 9**  
 Check all of the following that apply to the subject matter of the patent.  
☐ Manufacture of a machine or process  
☐ Manufacture of a composition  
☐ Manufacture of a material  
☐ Manufacture of a device  
☐ Manufacture of a method  
☐ Manufacture of a system  
☐ Manufacture of a structure  
☐ Manufacture of a component  
☐ Manufacture of a part  
☐ Manufacture of a subassembly  
☐ Manufacture of a module  
☐ Manufacture of a unit  
☐ Manufacture of a system  
☐ Manufacture of a device  
☐ Manufacture of a method  
☐ Manufacture of a structure  
☐ Manufacture of a component  
☐ Manufacture of a part  
☐ Manufacture of a subassembly  
☐ Manufacture of a module  
☐ Manufacture of a unit

Patent Value Tool (Optional - this may be used by the inventor and attorney to assist with the evaluation of the patent)  
 Post Disclosure Text & Drawings

(Form Revised 12/17/97)

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